

FIG. 1

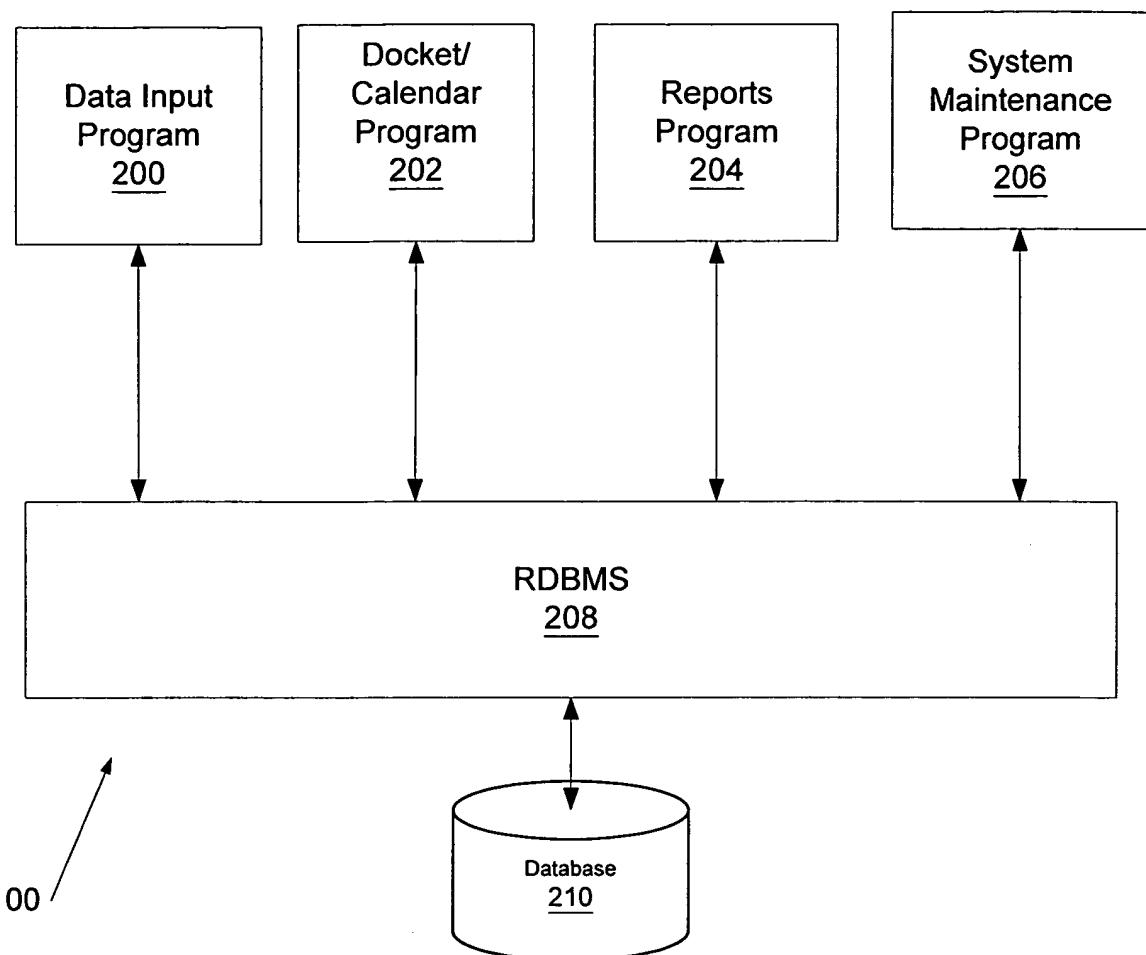


FIG. 2A

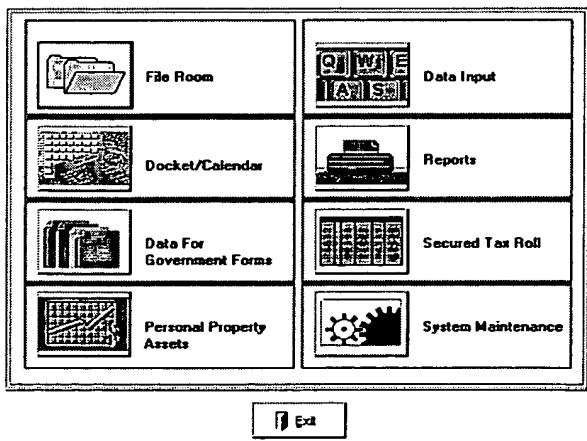


FIG. 2B Main Window

2020-00427860

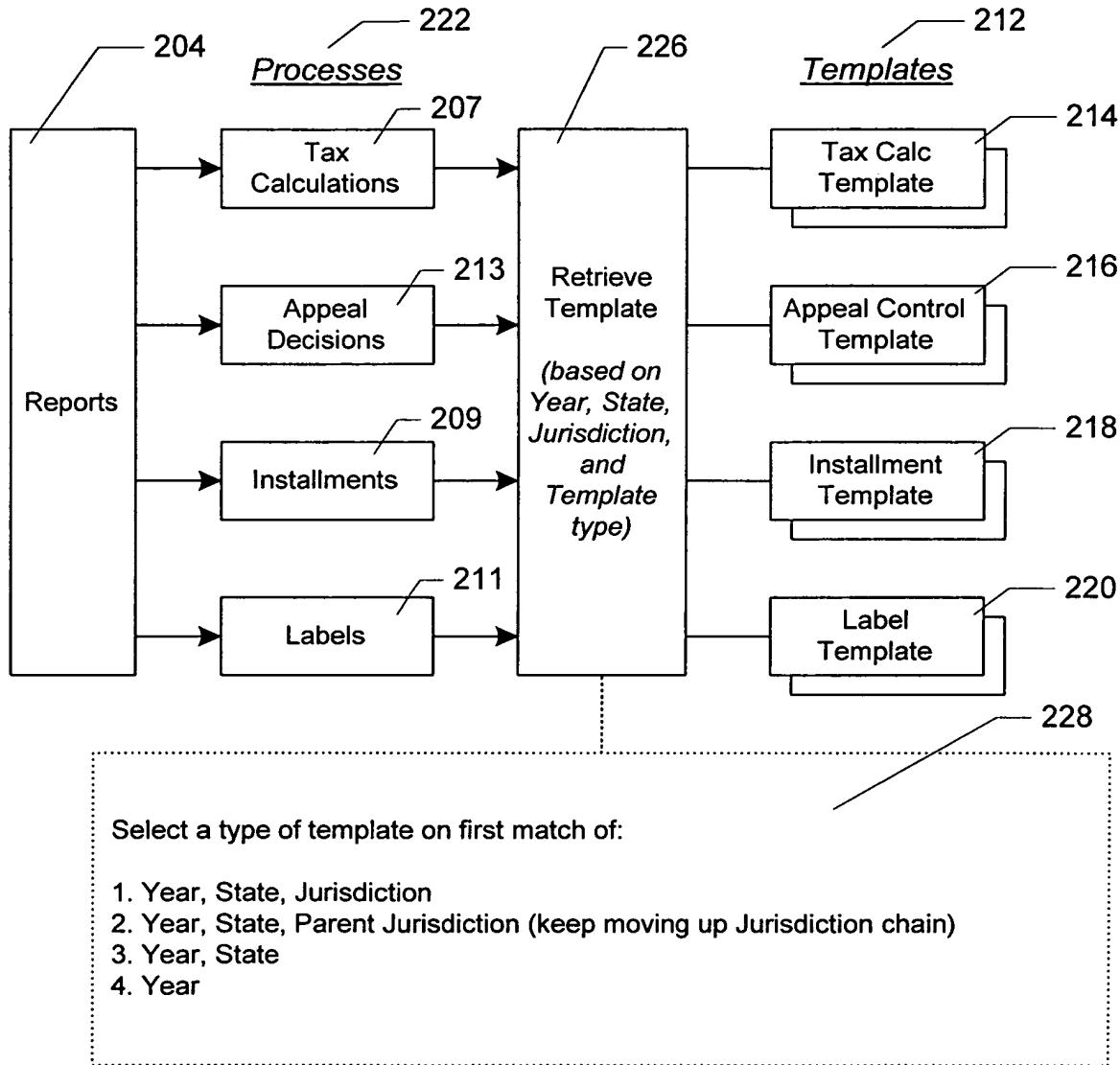


FIG. 3

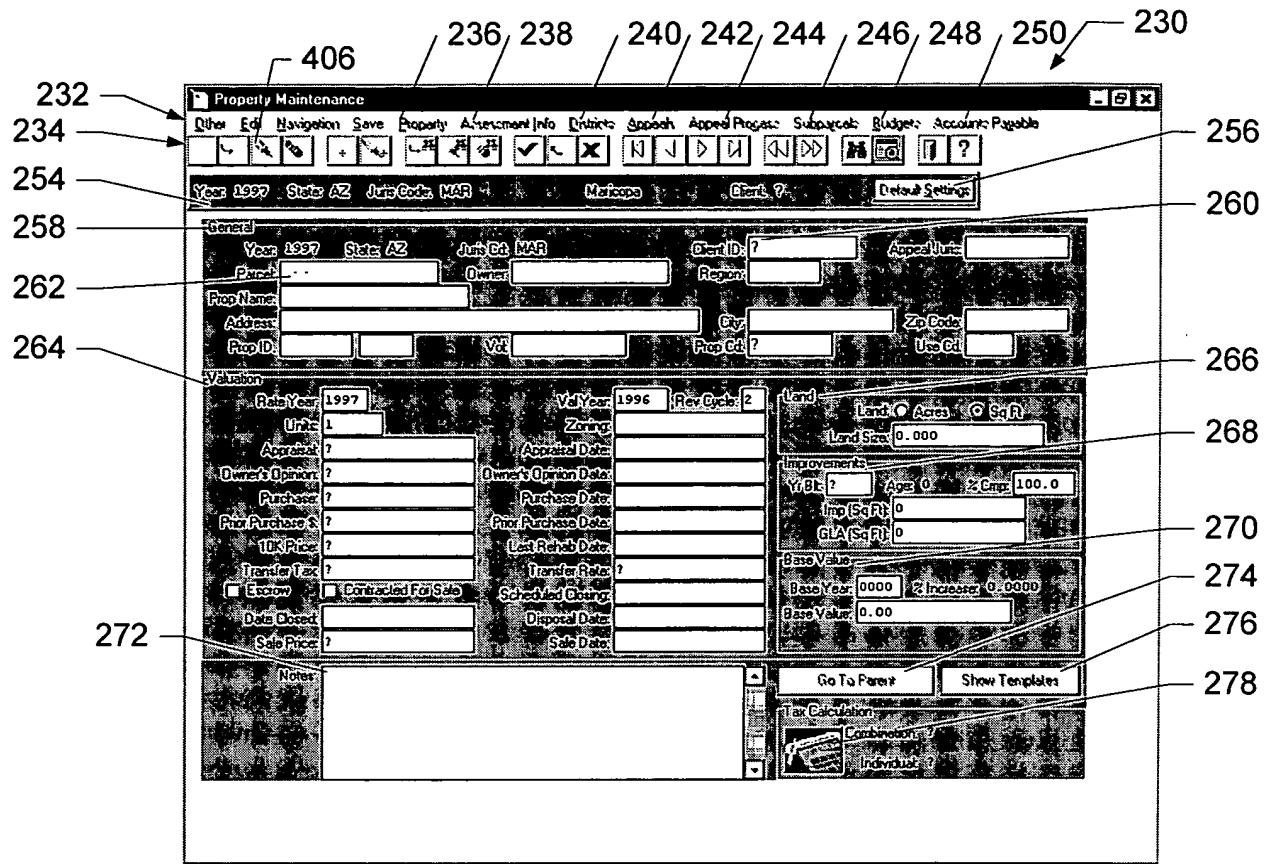


FIG. 4 Parcel Record

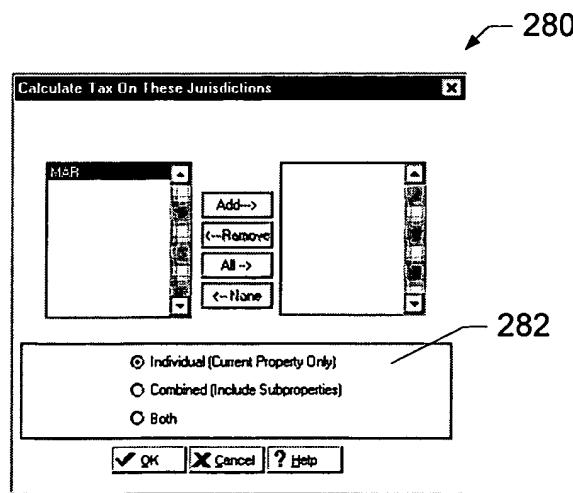


FIG. 5 Calculate Tax

<p>284</p> <p>Assessment Track</p> <p>Type: <input checked="" type="radio"/> RE <input type="radio"/> PP <input type="radio"/> SUP <input type="radio"/> NAV</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Track ID: 1</td> <td style="width: 50%;"><input checked="" type="checkbox"/> Plus Tax Rate <input type="checkbox"/> Projected</td> </tr> <tr> <td>Tax Bill #: N25</td> <td>FCV Rate: 0.100000</td> </tr> <tr> <td>Tax Bill Amt: 0.00</td> <td>LPV Rate: 0.052680</td> </tr> <tr> <td></td> <td>Eq. Ratio: 1.00000</td> </tr> </table> <p>Desr: <input checked="" type="checkbox"/> Include Assessment</p>	Track ID: 1	<input checked="" type="checkbox"/> Plus Tax Rate <input type="checkbox"/> Projected	Tax Bill #: N25	FCV Rate: 0.100000	Tax Bill Amt: 0.00	LPV Rate: 0.052680		Eq. Ratio: 1.00000	<p>752</p> <p>288</p> <p><input checked="" type="checkbox"/> This is a Private Track This track supersedes</p> <p>286</p> <p>285</p> <p>754</p> <p>Assessment Detail</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Subtype</th> <th>FDV</th> <th>Asd FCV</th> <th>FCV Imp</th> <th>FCV Lend</th> <th>Calc Tax Amount</th> </tr> </thead> <tbody> <tr> <td>Interim</td> <td>500,000</td> <td>720,000</td> <td>400,000</td> <td>500,000</td> <td>109,523.60</td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>Projected values are matched with an existing entry.</p> <p>Change Orders Move Up Move Down</p> <p>Subtype: Interim Class: 5 <input type="checkbox"/> Projected?</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;">Actual Value</td> <td style="width: 25%;">Land</td> <td style="width: 25%;">Improvements</td> <td style="width: 25%;"> </td> </tr> <tr> <td>FCV:</td> <td>900,000</td> <td>500,000</td> <td>400,000</td> </tr> <tr> <td>Asd FCV:</td> <td>720,000</td> <td>400,000</td> <td>320,000</td> </tr> <tr> <td>LPV:</td> <td>900,000</td> <td>Asd LPV:</td> <td>720,000</td> </tr> <tr> <td></td> <td></td> <td></td> <td>FCV Ratio: 80.000000</td> </tr> <tr> <td></td> <td></td> <td></td> <td>FCV Imp Ratio: ?</td> </tr> <tr> <td></td> <td></td> <td></td> <td>LPV Ratio: 80.000000</td> </tr> </table>	Subtype	FDV	Asd FCV	FCV Imp	FCV Lend	Calc Tax Amount	Interim	500,000	720,000	400,000	500,000	109,523.60																			Actual Value	Land	Improvements		FCV:	900,000	500,000	400,000	Asd FCV:	720,000	400,000	320,000	LPV:	900,000	Asd LPV:	720,000				FCV Ratio: 80.000000				FCV Imp Ratio: ?				LPV Ratio: 80.000000
Track ID: 1	<input checked="" type="checkbox"/> Plus Tax Rate <input type="checkbox"/> Projected																																																																		
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LPV:	900,000	Asd LPV:	720,000																																																																
			FCV Ratio: 80.000000																																																																
			FCV Imp Ratio: ?																																																																
			LPV Ratio: 80.000000																																																																

FIG. 6 Assessments

FIG. 7 Districts

296 298

284

294

Appeal Billing

Select a Track and/or Appeal				
Type	Track ID	Prorata	ECA	Appeal Reference
PERPROP	PPI	No		
A REAL	11	No	No	
A Tracks With Appeal Activity				

Appeal Record

Appeal #: [] File #: [] Billing#: [] Date Created: 12/28/98

Appeal Ref: [] Complainant: []

Appeal Type: Standard Appeal Error Correction Appeal Override standard appeal at: Level: 0 Hearing: 0

Appeal Reasons: [] Status: []

Responsible Professional: [] Allocated?

Working Professional: []

Consultant: [] Consultant Engaged

Appellant Code: ? Appellant Other Info: []

Appeal Code: ? Appeal Other Info: []

Refund Expected: ? Refund Received: ? Tax Credit: ?

Notes: []

FIG. 8 Appeal Record

296 298

304

302

Appeal Billing

Select a Track and/or Appeal				
Type	Group	Prorata	ECA	Appeal Reference
A REAL		No	Yes	Garage Appeal
A Tracks Currently Under Appeal				

Billing Information

Fee Agreement #1		Fee Agreement #2		Fee Agreement #3		
Billing Type	Terms	Final Amount	Terms	Final Amount	Terms	Final Amount
Contingency	<input type="checkbox"/>	0.00	<input type="checkbox"/>	0.00	<input type="checkbox"/>	0.00
Flat	<input type="checkbox"/>	0.00	<input type="checkbox"/>	0.00	<input type="checkbox"/>	0.00
Hourly	<input type="checkbox"/>	0.00	<input type="checkbox"/>	0.00	<input type="checkbox"/>	0.00
Form:		Form:		Form:		

Multiple Years Final Year: []

Referral

Firm: []	Contact: []
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Contingency Flat Fee Amount: []

FIG. 9 Appeal Billing

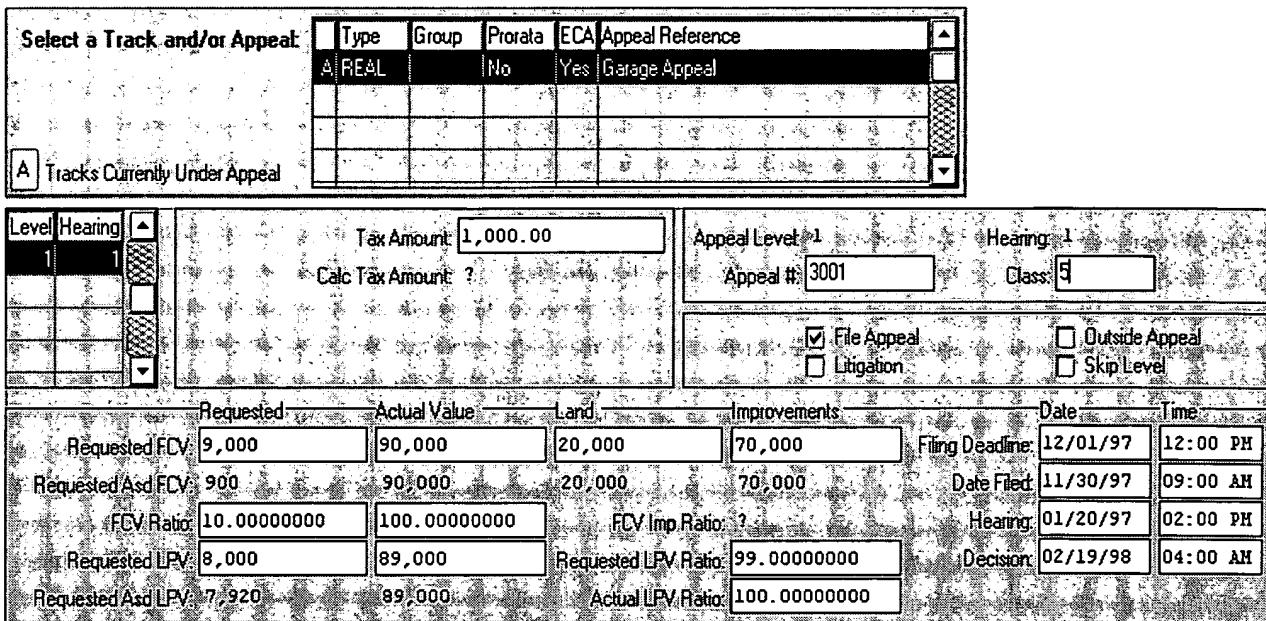


FIG. 10 Appeal Process

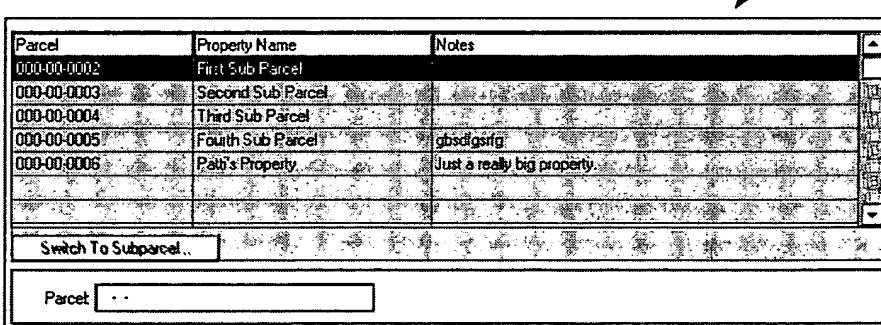


FIG. 11 Subparcels

308

<p>Budget Name: <input type="text"/> Default</p> <p>NAV Only: no Personal Only: no Real Only: yes Sup Only: no</p> <p>332 334 336</p> <p style="text-align: center;"><input type="button" value="Open Budget"/> <input type="button" value="Select Default Budget"/> <input type="button" value="Combine Budgets"/></p> <p>Create new budget parameters or edit existing ones. When you're ready, press 'Open Budget' to go into the budget worksheet.</p>	<p>Budget Name: <input type="text"/> Time Saved: 4:54 pm Saved By: <input type="checkbox"/> Combined Property</p> <p>Annual Increase Rates FCV Increase: <input type="text"/> FCV Rate Increase: <input type="text"/> LPV Increase: <input type="text"/> LPV Rate Increase: <input type="text"/></p> <p>Other Parameters Years To Forecast: <input type="text"/> 10 Equalization Ratio: <input type="text"/> 1.00000</p> <p>Budget On This Track Type <input type="radio"/> Real <input type="radio"/> Personal <input type="radio"/> Supplemental <input checked="" type="radio"/> NAV</p> <p>Notes:</p> <p>310 312 314 316 320 318 324 326 322 328</p>
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FIG. 12 Create Budgets

338

Budget Worksheet for Scot Test																																																																																									
Property Year: 1997 State: AZ Juris Cd: Mar Parcel: 222-22-222A																																																																																									
Prop Name: Parker Residence	Prop ID:																																																																																								
Budget Name: Scot Test <input checked="" type="checkbox"/> Real <input type="checkbox"/> Personal <input type="checkbox"/> Supplemental																																																																																									
TV Increase: 0.02000	DV Increase: 0.00000																																																																																								
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Years To Forecast: 10 <input type="checkbox"/> Combined Budget																																																																																									
<table border="1"> <thead> <tr> <th>Year</th> <th>TV</th> <th>TV Tax Rate</th> <th>TV Ratio</th> <th>DV</th> <th>DV Tax Rate</th> <th>DV Ratio</th> <th>Tax</th> </tr> </thead> <tbody> <tr><td>1997</td><td>100,000</td><td>0.030000</td><td>0.0000</td><td>200,000</td><td>0.000000</td><td>10.0000</td><td>300.00</td></tr> <tr><td>1998</td><td>102,000</td><td>0.030600</td><td>0.0000</td><td>200,000</td><td>0.000000</td><td>10.0000</td><td>0.00</td></tr> <tr><td>1999</td><td>104,040</td><td>0.031212</td><td>0.0000</td><td>200,000</td><td>0.000000</td><td>10.0000</td><td>0.00</td></tr> <tr><td>2000</td><td>106,121</td><td>0.031836</td><td>0.0000</td><td>200,000</td><td>0.000000</td><td>10.0000</td><td>0.00</td></tr> <tr><td>2001</td><td>108,243</td><td>0.032473</td><td>0.0000</td><td>200,000</td><td>0.000000</td><td>10.0000</td><td>0.00</td></tr> <tr><td>2002</td><td>110,408</td><td>0.033122</td><td>0.0000</td><td>200,000</td><td>0.000000</td><td>10.0000</td><td>0.00</td></tr> <tr><td>2003</td><td>112,516</td><td>0.033765</td><td>0.0000</td><td>200,000</td><td>0.000000</td><td>10.0000</td><td>0.00</td></tr> <tr><td>2004</td><td>114,683</td><td>0.034461</td><td>0.0000</td><td>200,000</td><td>0.000000</td><td>10.0000</td><td>0.00</td></tr> <tr><td>2005</td><td>117,166</td><td>0.035150</td><td>0.0000</td><td>200,000</td><td>0.000000</td><td>10.0000</td><td>0.00</td></tr> <tr><td>2006</td><td>119,509</td><td>0.035853</td><td>0.0000</td><td>200,000</td><td>0.000000</td><td>10.0000</td><td>0.00</td></tr> </tbody> </table>		Year	TV	TV Tax Rate	TV Ratio	DV	DV Tax Rate	DV Ratio	Tax	1997	100,000	0.030000	0.0000	200,000	0.000000	10.0000	300.00	1998	102,000	0.030600	0.0000	200,000	0.000000	10.0000	0.00	1999	104,040	0.031212	0.0000	200,000	0.000000	10.0000	0.00	2000	106,121	0.031836	0.0000	200,000	0.000000	10.0000	0.00	2001	108,243	0.032473	0.0000	200,000	0.000000	10.0000	0.00	2002	110,408	0.033122	0.0000	200,000	0.000000	10.0000	0.00	2003	112,516	0.033765	0.0000	200,000	0.000000	10.0000	0.00	2004	114,683	0.034461	0.0000	200,000	0.000000	10.0000	0.00	2005	117,166	0.035150	0.0000	200,000	0.000000	10.0000	0.00	2006	119,509	0.035853	0.0000	200,000	0.000000	10.0000	0.00
Year	TV	TV Tax Rate	TV Ratio	DV	DV Tax Rate	DV Ratio	Tax																																																																																		
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2006	119,509	0.035853	0.0000	200,000	0.000000	10.0000	0.00																																																																																		
Budget Status: This budget is saved.																																																																																									
<table border="1"> <thead> <tr> <th>Tax Year</th> <th>Installment</th> <th>Tax</th> <th>Date Due</th> <th>Total Payment</th> </tr> </thead> <tbody> <tr><td>1997</td><td>1</td><td>150.00</td><td>11/03/1997</td><td>150.00</td></tr> <tr><td>1997</td><td>2</td><td>150.00</td><td>05/01/1998</td><td>300.00</td></tr> <tr><td></td><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td><td></td></tr> </tbody> </table>		Tax Year	Installment	Tax	Date Due	Total Payment	1997	1	150.00	11/03/1997	150.00	1997	2	150.00	05/01/1998	300.00																																																																									
Tax Year	Installment	Tax	Date Due	Total Payment																																																																																					
1997	1	150.00	11/03/1997	150.00																																																																																					
1997	2	150.00	05/01/1998	300.00																																																																																					
Show: <input checked="" type="radio"/> Tax From 1997 <input type="radio"/> Installments Due in 1997																																																																																									
<input type="button" value="Save Budget"/> <input type="button" value="Recalculate Budget"/> <input type="button" value="Restore to Last Saved"/> <input type="button" value="Start Over"/> <input type="button" value="Exit"/>																																																																																									

FIG. 13 Budget Worksheet

- 348

FIG. 14 Accounts Payable

- 350

352

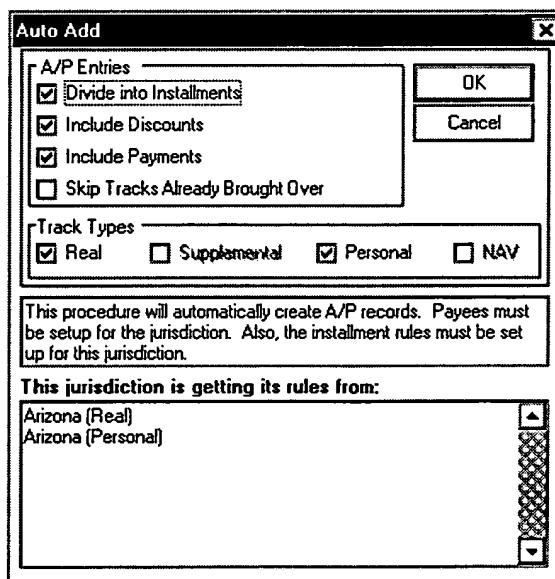


FIG. 15 Auto Add

260

Client ID	Name	Active?
2802	HUNTER'S GLEN APARTMENTS	Y
2803	LIBERTY LUP	Y
2804	FIRST UNION REAL ESTATE EQUITY	Y
2805	RONISHOFF	Y
2806	BANK ONE (CHICAGO)	Y
3040	3040 North 44th Street Partners	Y
777NVE	777 Investments LLC	Y
9598	Ashley Eleanor Merritt	Y

366

Client ID: 1001

354

368

356

Client ID	Client Name	Client #	Billing #
9998	Ashley Eleanor Merritt	9998	9998

358

Type	SubType	Responsible Attorney
Client	Current	R.J.T Rich J. Truly

360

362

Address:	8000 N. Barney Lane			Notes:	
Mailing Address:	P. O. Box 7				
City:	Phoenix	State:	AZ	Zip:	85020
E-Mail Address:	ashley@naccarati.com				
Phone:	602-900-9998	Extention:		Region:	
Fax:	602-300-9997			Active:	<input checked="" type="checkbox"/>
Parent ID:	9999	Patti Naccarati		Referring Individual:	
Referral ID:				Referral Terms:	

364

370

FIG. 16 Address Information

372

454 452 456

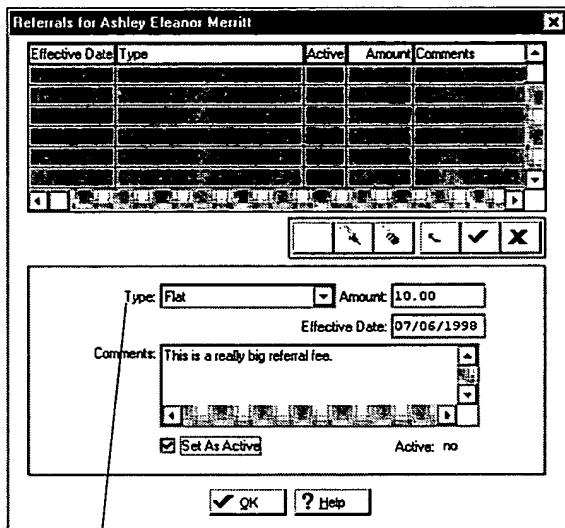
490

371

Contact Maintenance	
Indv ID	Full Name
1	Jackie O. Quinn
<input type="checkbox"/> Address is Same as Client Address 1: Address 2: Address 3: City: State: ZIP: E-Mail:	
Individual ID: <input type="text"/> Contact Type: <input type="text"/> Accounts Payable Full Name: <input type="text"/> First Name: <input type="text"/> Last Name: <input type="text"/> Title: <input type="text"/> Phone: <input type="text"/> Business <input type="text"/> Ext. <input type="text"/> 	

FIG. 17 Contacts

374

FIG. 18 Referral
376

380

Individual Id	Name	Title	Number
MKP	MARIA KATHY PERCOCET	Attorney	3
MSK	MARY S. KRANKY	Attorney	102
PIN	Patti Naccarati	Attorney	9999
RDN	RICHARD D. NEARHOOD	Attorney	1
RDN1	R.D.Nearhood	Attorney	100
RJT	RICHARD J. TRULY	Attorney	103
WIS	WILLIAM STEPHEN	Attorney	100
WS	WILLIAM STEPHEN JR.	Attorney	101

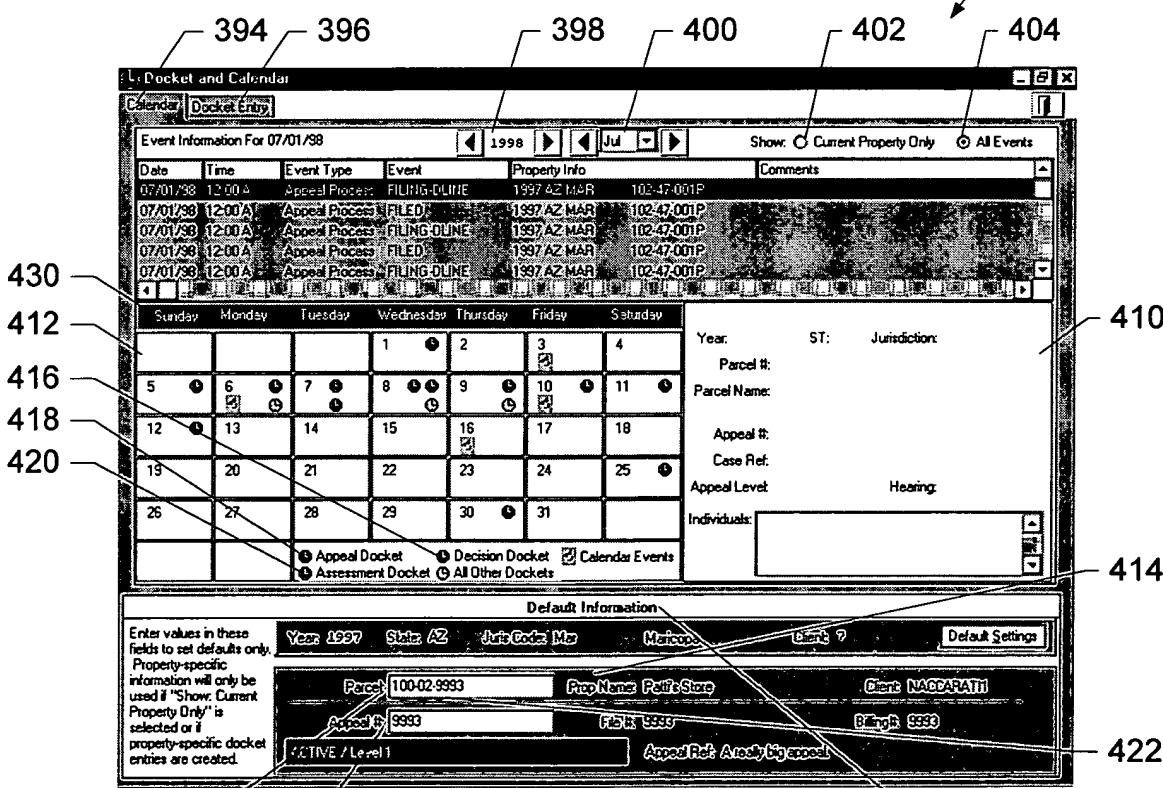
Individual Id: AEM Title: Little Lawyer
Name: Ashley Eleanor Merrill
Number: 998 Attorney: N

FIG. 19 Working Professionals
391

388

390

392

FIG. 20 Calendar
262 424 408

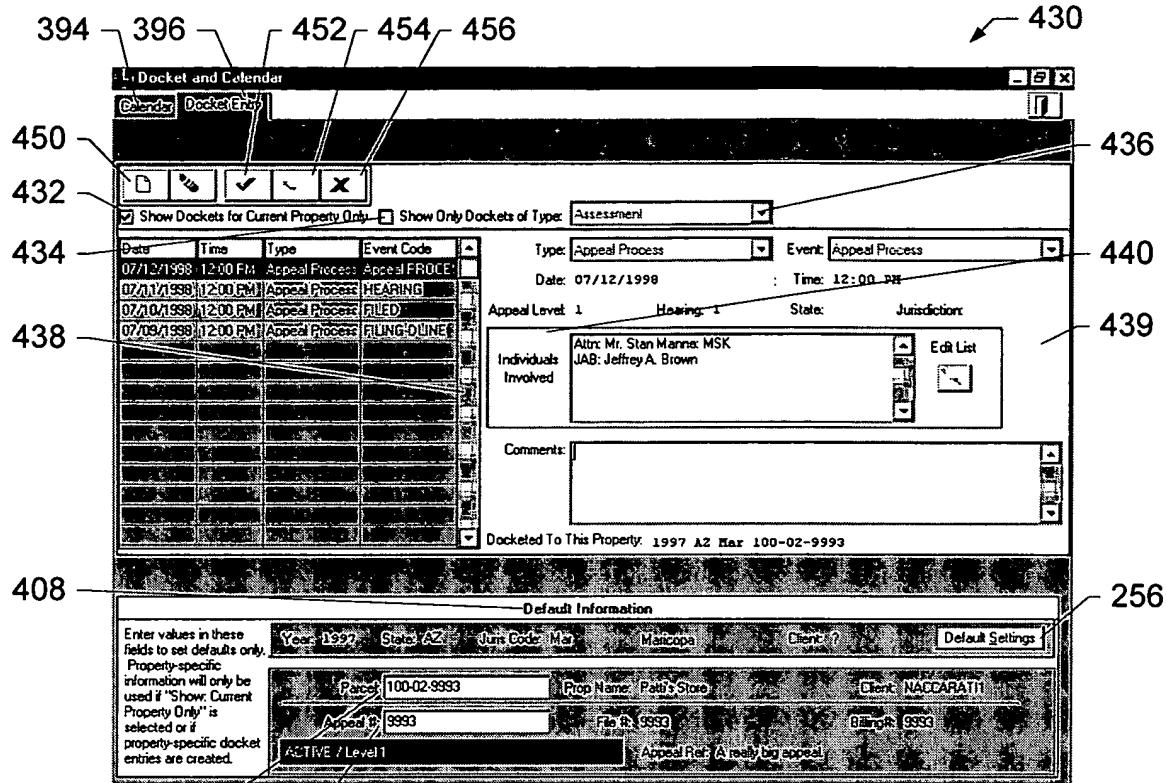


FIG. 21 Docket Entry

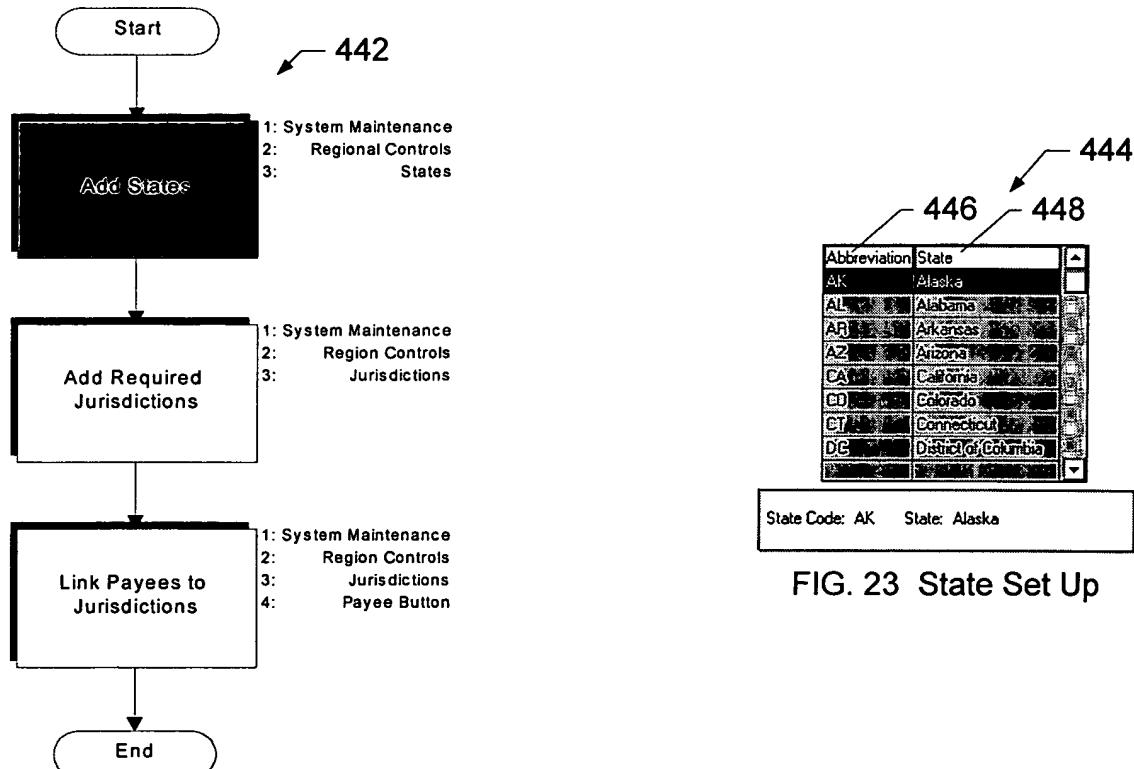


FIG. 22 Creating States and Jurisdictions

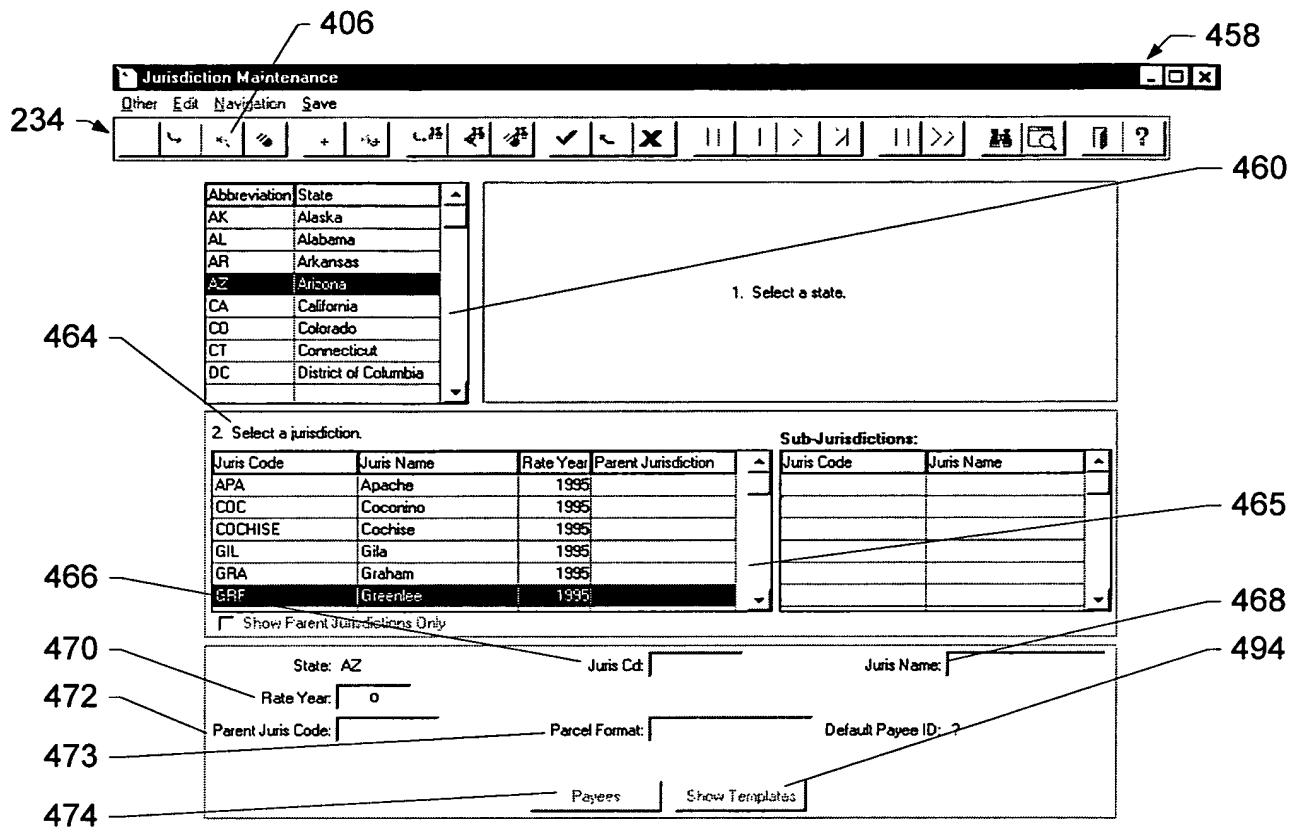


FIG. 24 Jurisdiction Set Up

Payees for MAR/AZ

Payee ID	Name	Default
MCT	Maricopa County Tax Collector	Y

Payee Detail

Client ID	Client Name	Client #	Billing #
MCT	Maricopa County Tax Collector	MCT	MCT
Type	SubType	Responsible Individual	
Collector	[None]	(None)	

Address: 121 W. Jefferson

Mailing Address:
City: Phoenix State: AZ Zip: 85001
E-Mail Address: taxcollector@maricopacounty.com
Phone: 602-565-0000 Extension: 2
Fax: 602-565-0001 Region: Active: Y

Parent ID: ? Referring Individual: Referral Term:

FIG. 25 Jurisdiction Payee

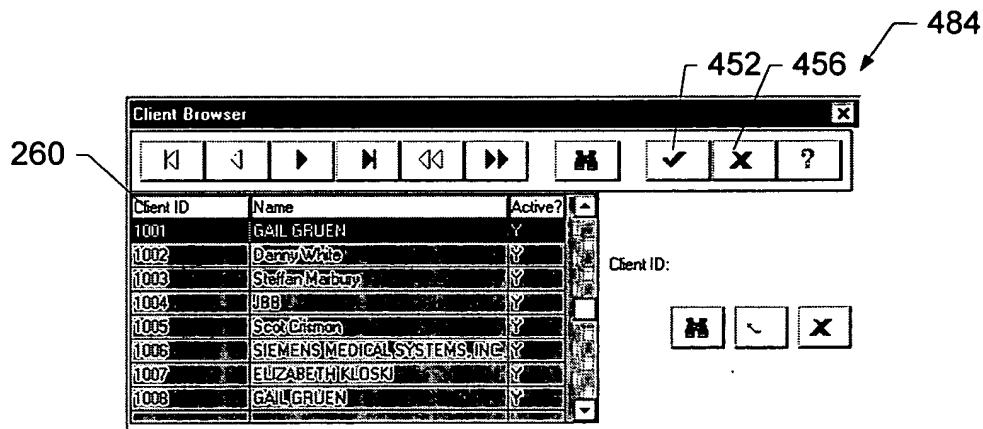


FIG. 26 Client Browser

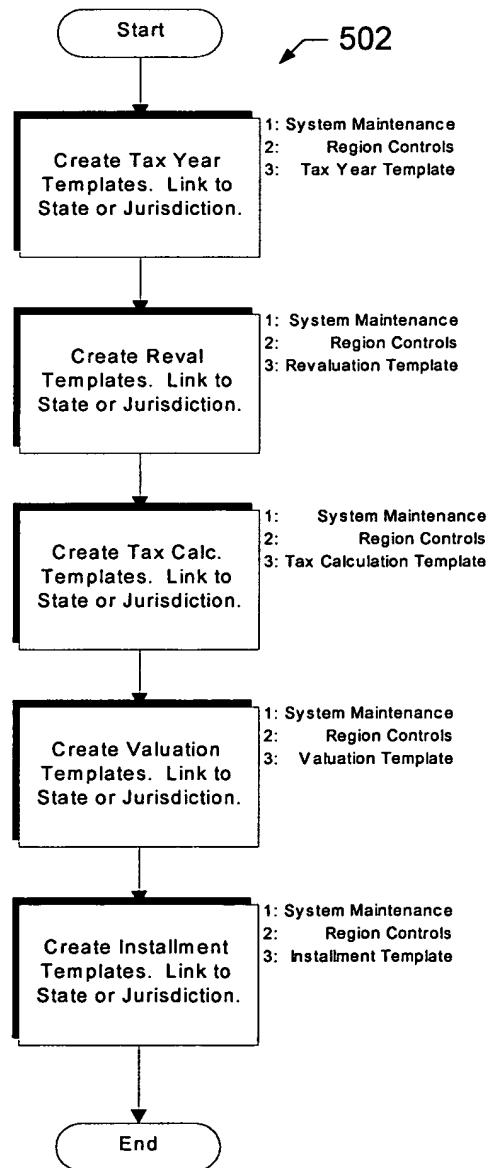


FIG. 27 Templates

<p>Name</p> <p>Arizona Texas</p> <p>Links</p>	<p>510 515 506 505</p> <p>Start Year</p> <p>Start Month: <input type="text" value="1"/> Start Day: <input type="text" value="1"/></p> <p>Year:</p> <ul style="list-style-type: none"> <input type="radio"/> Two Years Prior <input type="radio"/> Previous Year <input checked="" type="radio"/> Current Year <input type="radio"/> Next Year <input type="radio"/> Two Years From <p>If day falls on holiday or weekend then move the day to the:</p> <ul style="list-style-type: none"> <input checked="" type="radio"/> Prior Workday <input type="radio"/> Next Workday <input type="radio"/> Ignore 	<p>504 517 508</p> <p>Next Year</p> <p>Start Month: <input type="text" value="12"/> Start Day: <input type="text" value="31"/></p> <p>Year:</p> <ul style="list-style-type: none"> <input type="radio"/> Two Years Prior <input type="radio"/> Previous Year <input checked="" type="radio"/> Current Year <input type="radio"/> Next Year <input type="radio"/> Two Years From <p>If day falls on holiday or weekend then move the day to the:</p> <ul style="list-style-type: none"> <input type="radio"/> Prior Workday <input type="radio"/> Next Workday <input type="radio"/> Ignore
--	--	---

FIG. 28 - TAX YEAR TEMPLATE

The screenshot shows a software window titled "Arizona". At the top, there is a toolbar with icons for back, forward, search, and help, labeled with numbers 450 through 516. Below the toolbar, the text "Template Name: Arizona" is displayed. To the left, a vertical list of options is shown with numbers 234, 518, 520, 522, 524, 526, 528, 523, 521, 448, and 496 pointing to "Show: Jurisdiction", "Show: State", "Show: System Master", and "Show: All". The main area contains a table with columns: Link Type, Start Year, End Year, State, and Jurisdiction Code. A single row is visible with "STATE" in the Link Type column, "0000" in the Start Year column, "9999" in the End Year column, "AZ" in the State column, and "9999AZ" in the Jurisdiction Code column. A scroll bar is on the right side of the table. Below the table, there are checkboxes for "Jurisdiction", "State", and "System Default". Input fields for "Start Year" (0000), "End Year" (9999), "State" (empty), and "Juris Cd" (empty) are present. A "Status" box at the bottom contains the text "Link 'Arizona' to , up until present." Number 530 points to the "Status" box.

FIG. 29 Tax Year Template Link To

Tracks	Template Description	Template Name
All	Tax Calculation	Arizona Do Not Modify
All	Valuation Control	Arizona Do Not Modify
All	Appeal Control	Arizona Do Not Modify
REAL	Installment Rules	Arizona
PERPF	Installment Rules	Arizona
SUP	Installment Rules	Arizona
NAV	Installment Rules	Arizona
All	Dynamic Labels	Arizona Do Not Modify
All	Tax Year Dates	Arizona

FIG. 30 Templates by Year

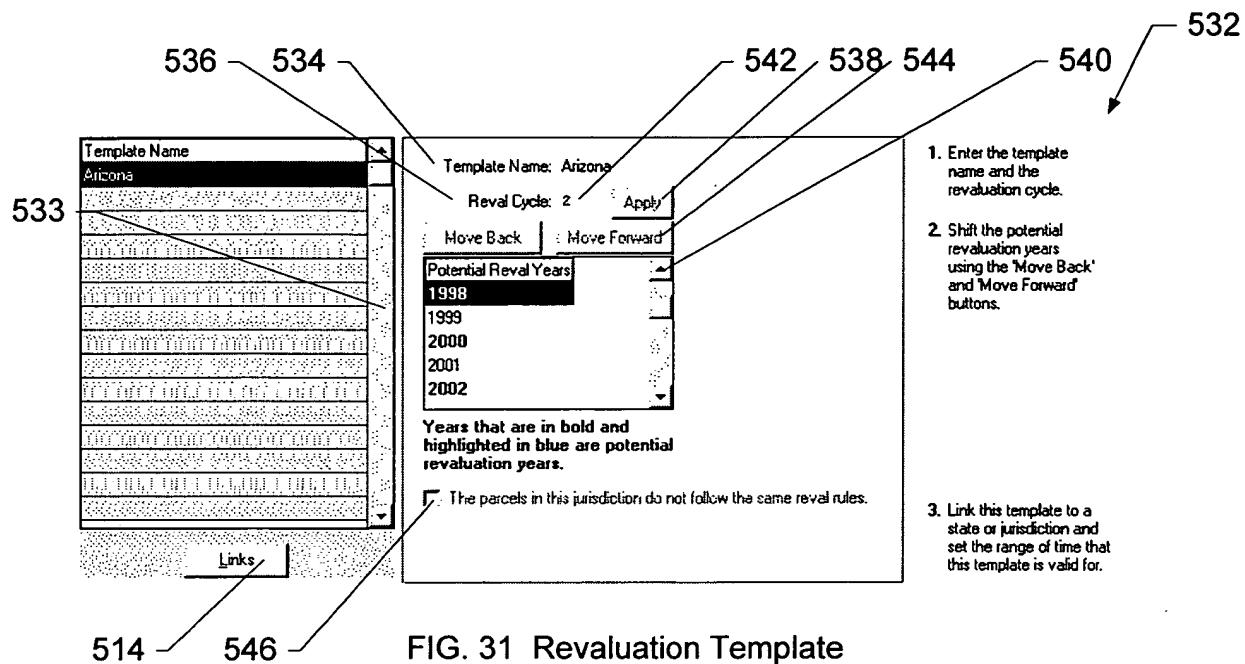


FIG. 31 Revaluation Template

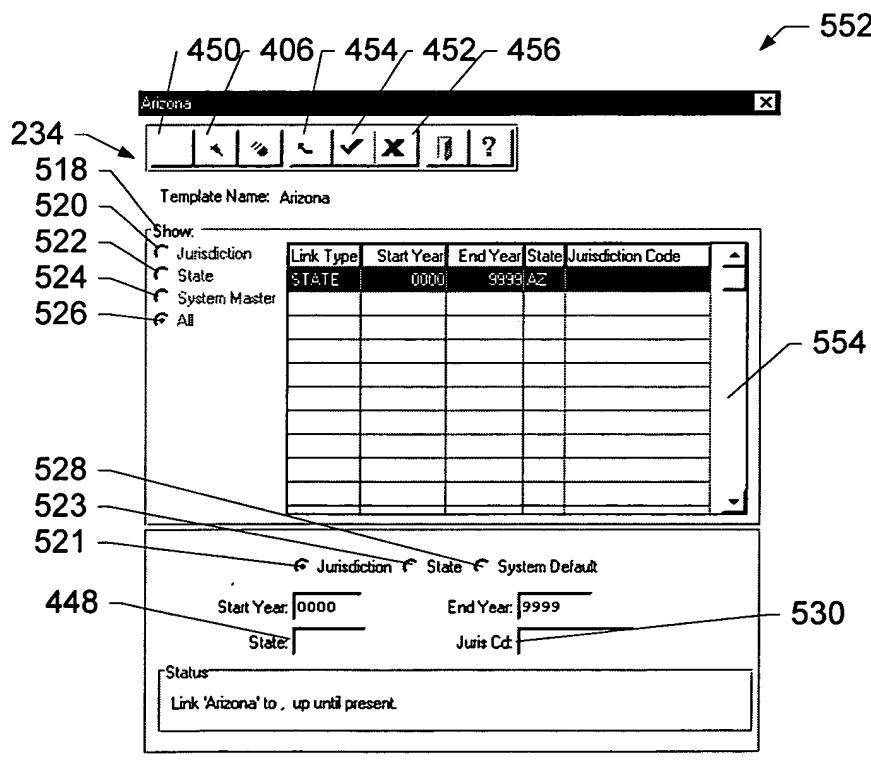
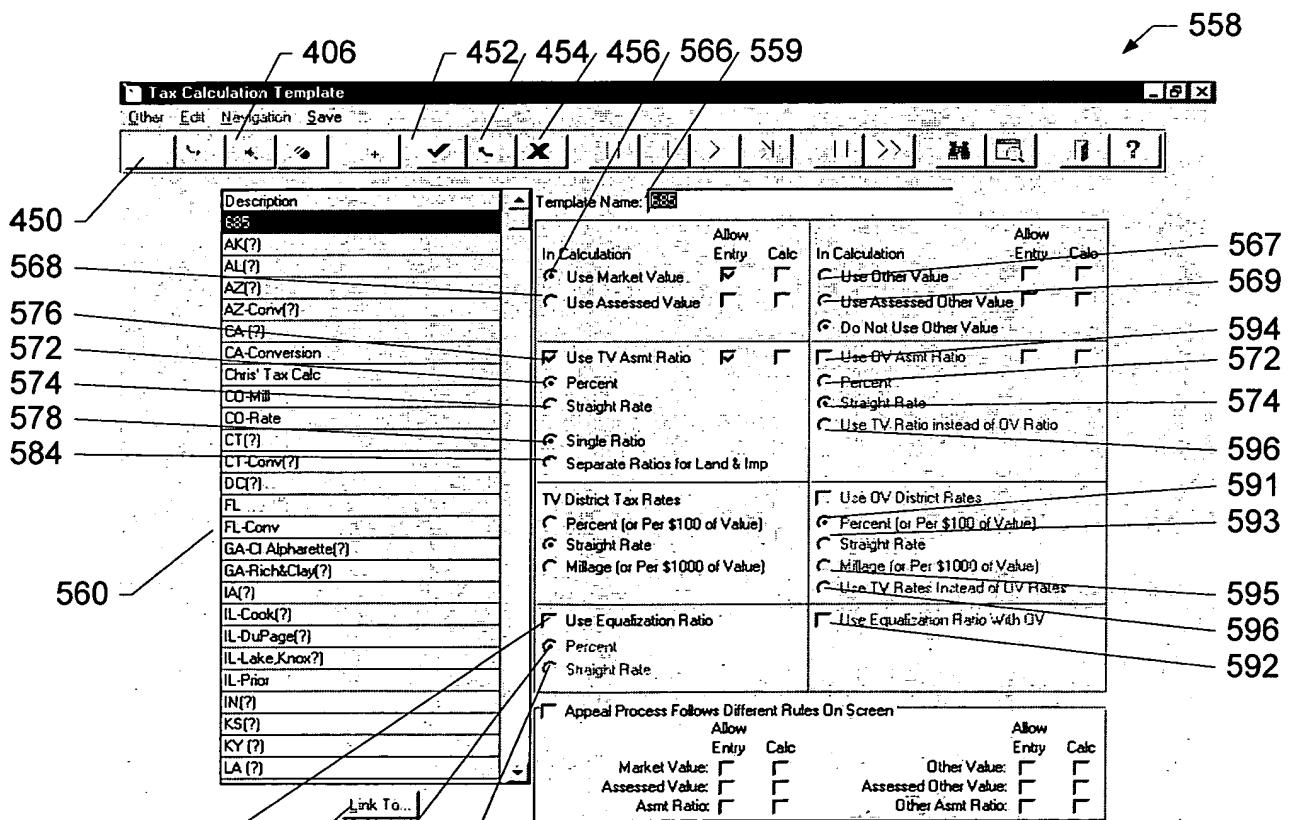
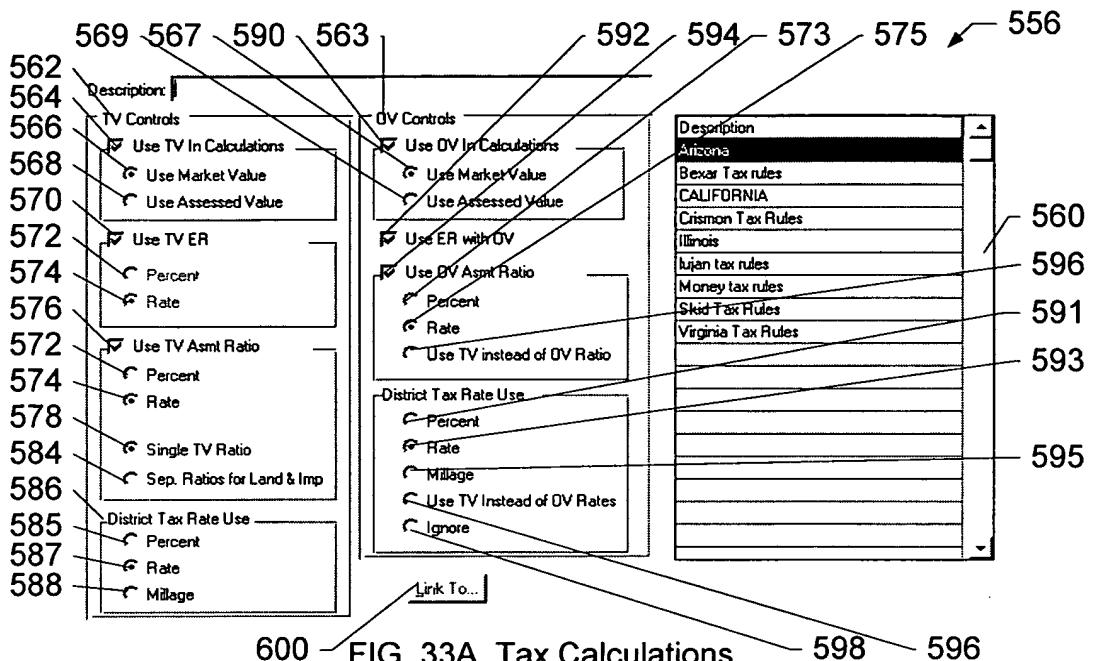


FIG. 32 Template Link To



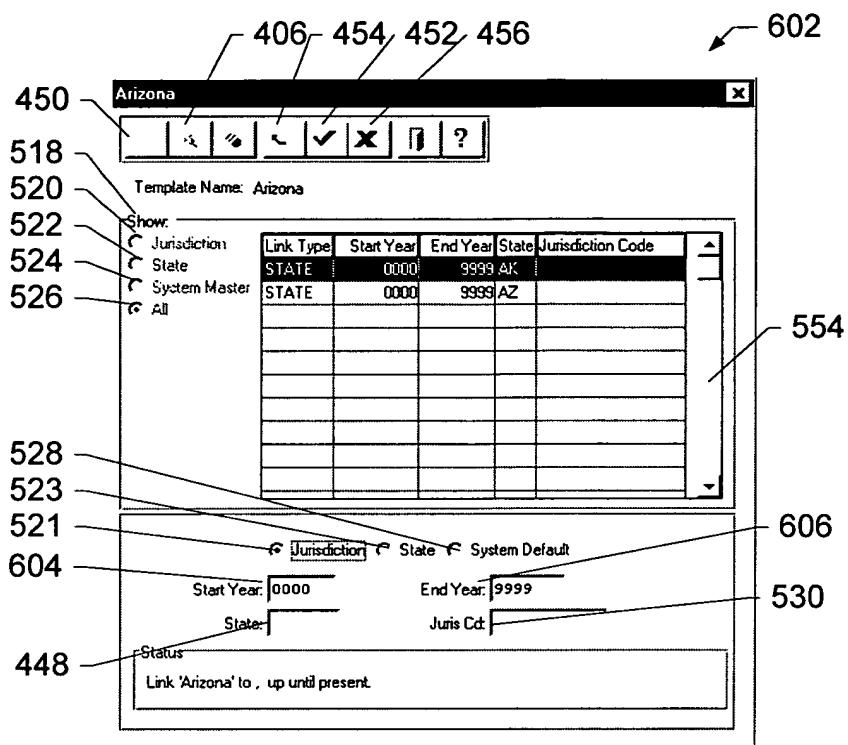


FIG. 34 Tax Calculation Link To

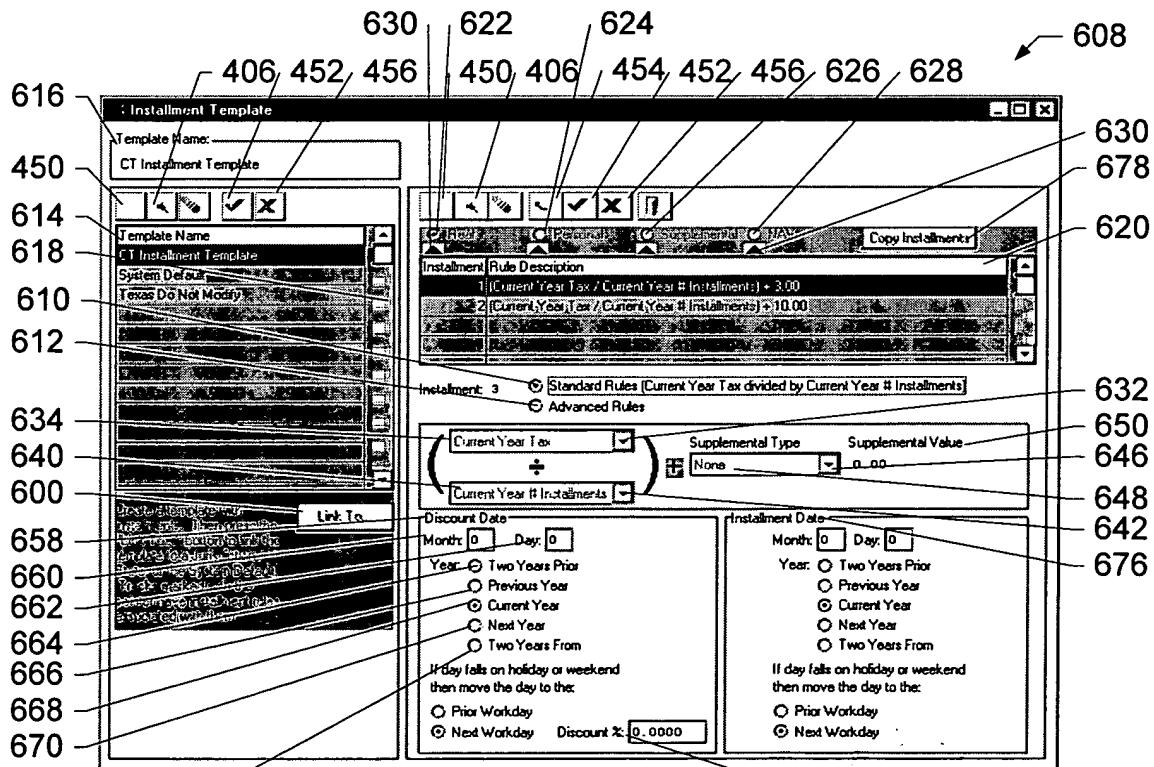


FIG. 35 Installment Template

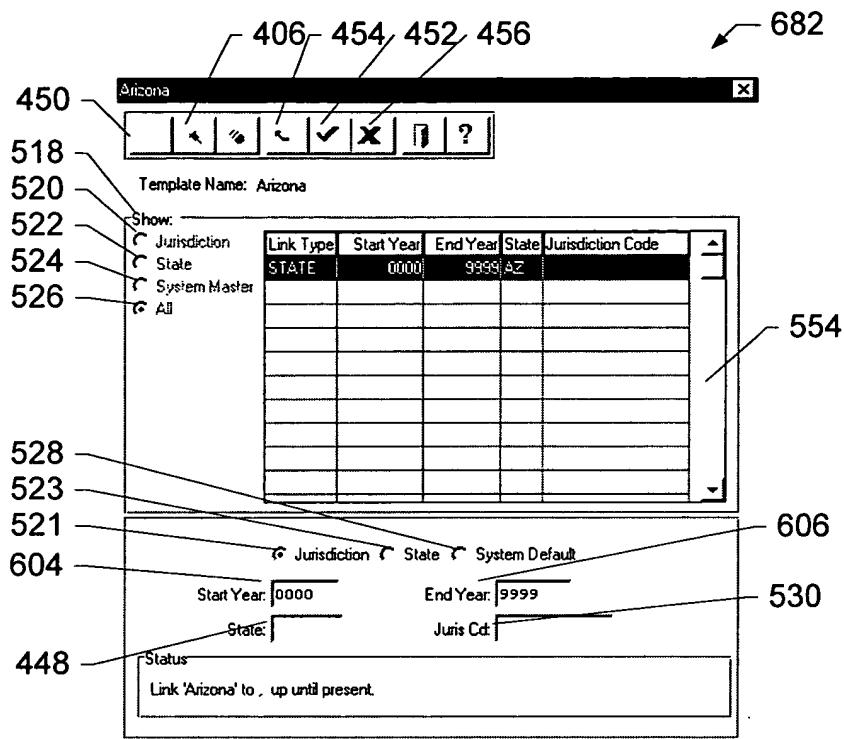


FIG. 36 Installment Templates Link To

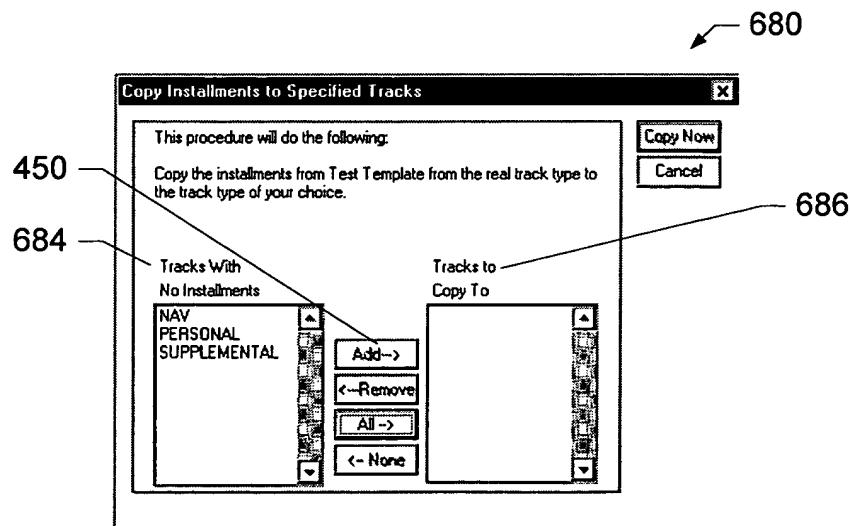


FIG. 37 Copy Installments Dialog Box

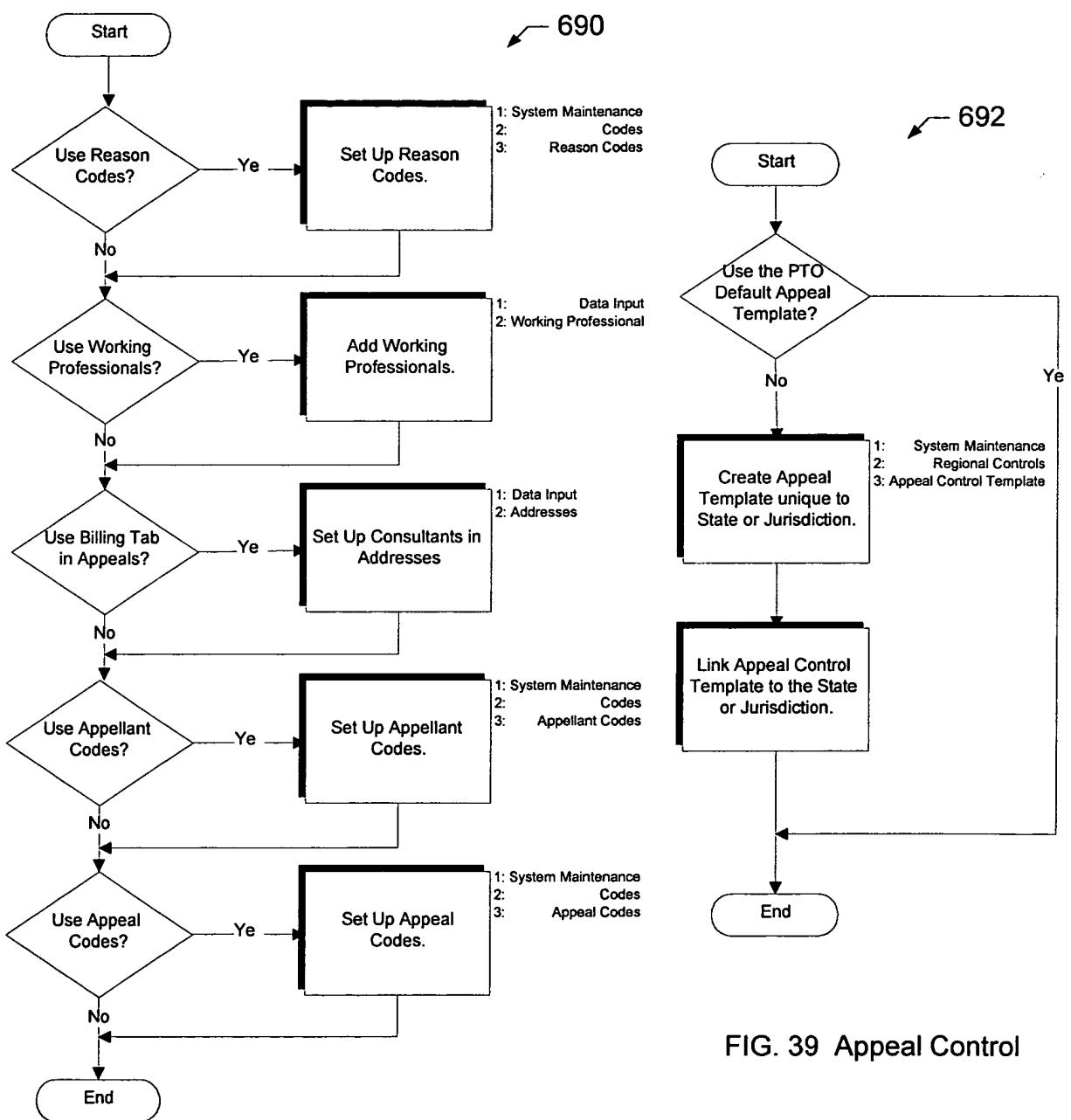


FIG. 38 Appeals Set Up

FIG. 39 Appeal Control

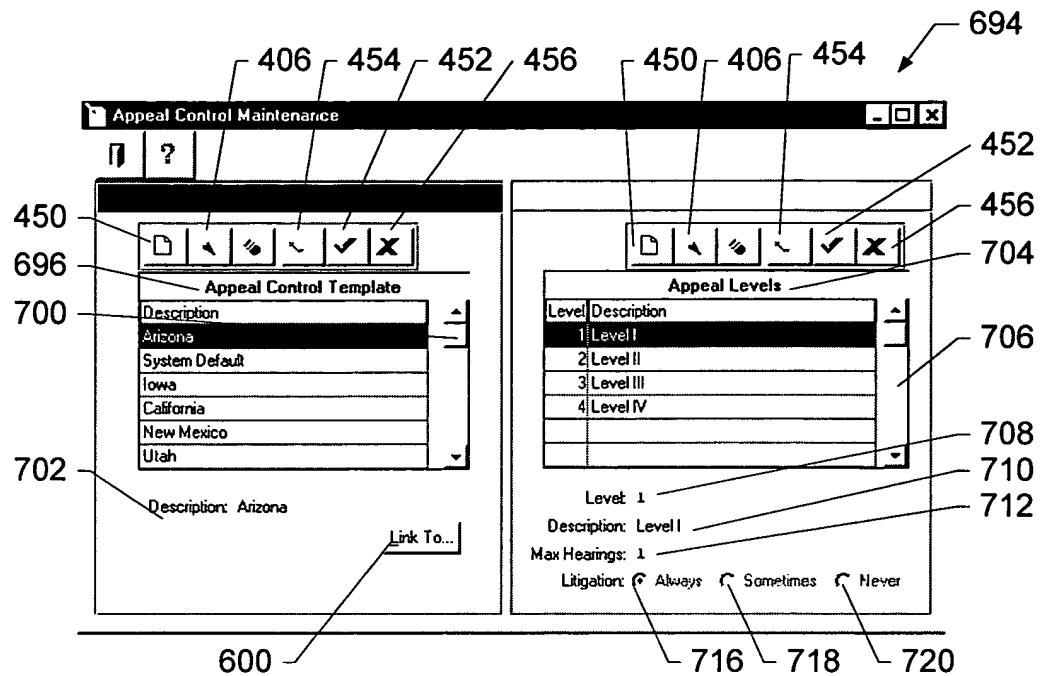


FIG. 40 Appeal Control

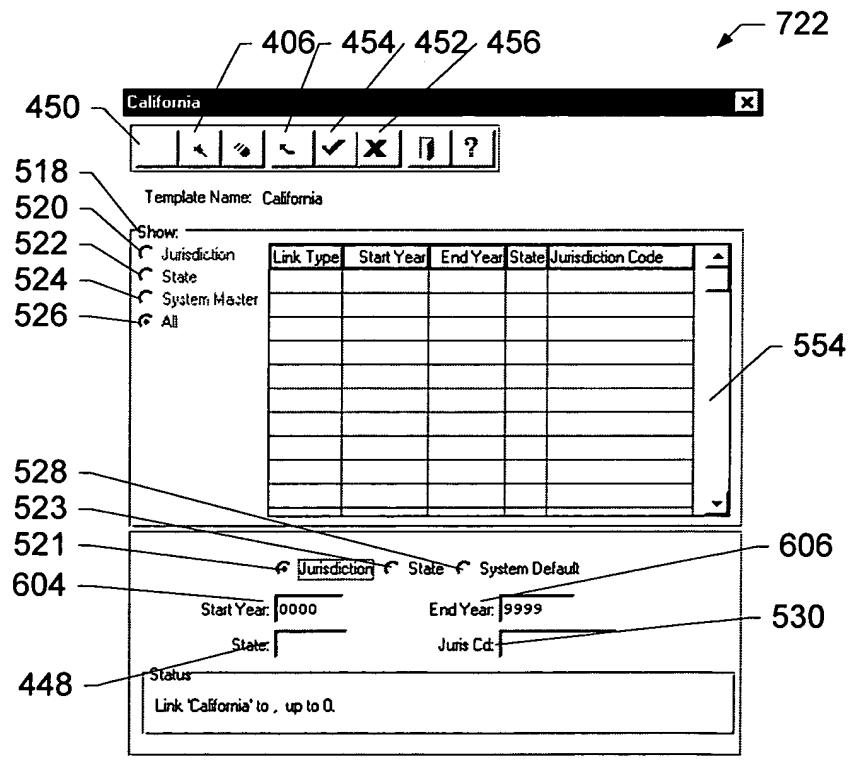


FIG. 41 Appeal Control Link

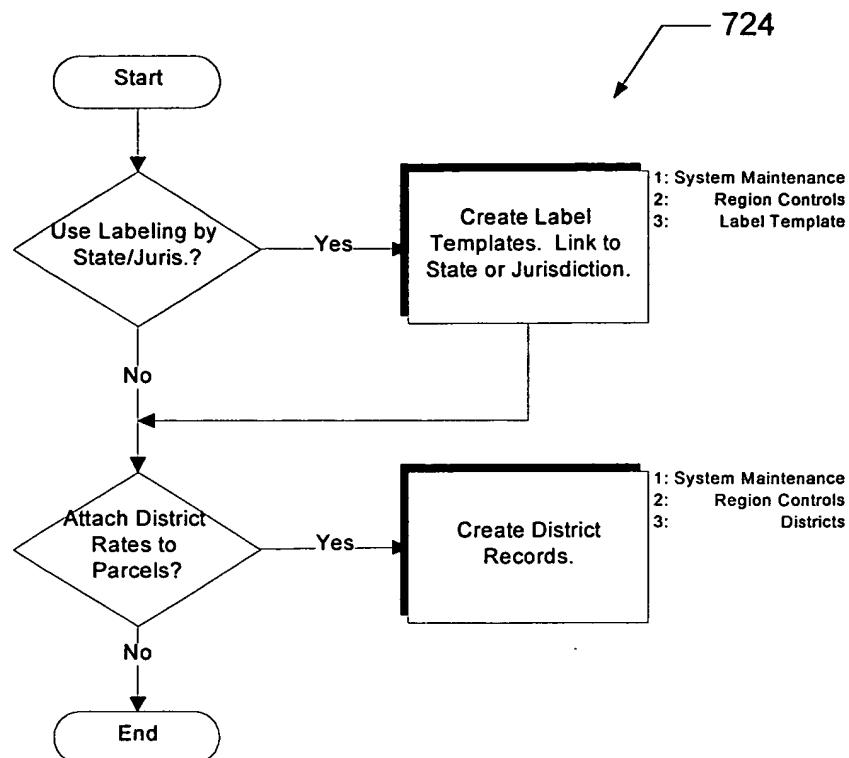


FIG. 42 Dynamic Labeling and Districts

728

Label Templates	
Template Name	Master
FL	
AZ	
CA	
Crismon Labels	
money labels	
<input a="" button="" default."="" jurisdiction,="" link="" or="" state,="" system="" template="" the="" to="" to..."="" type="button" value="Create a template with other state names. Then press the "/>	
<input type="button" value="Link To..."/>	

730

731

600

724

732

734

736

740

Label List	
Label	New Label
Asd OV	Asd OV
Asd TV	AV
Asd TV Imp	AV Imp
Asd TV Land	AV Land
Asd TV Imp	AV Imp
Asd TV Land	AV Land
Decision OV Ratio	Decision OV Ratio
Decision OV/Ratio	Decision OV/Ratio
OV	OV
OV Dst Tax Rate Use	OV Dst Tax Rate Use
OV Dst TaxRate Use	OV Dst TaxRate Use
OV ER Treatment	OV Eq Mult
OV ER!Trmt	OV Eq Mult
OV Increase	OV Increase

FIG. 43A Label Template

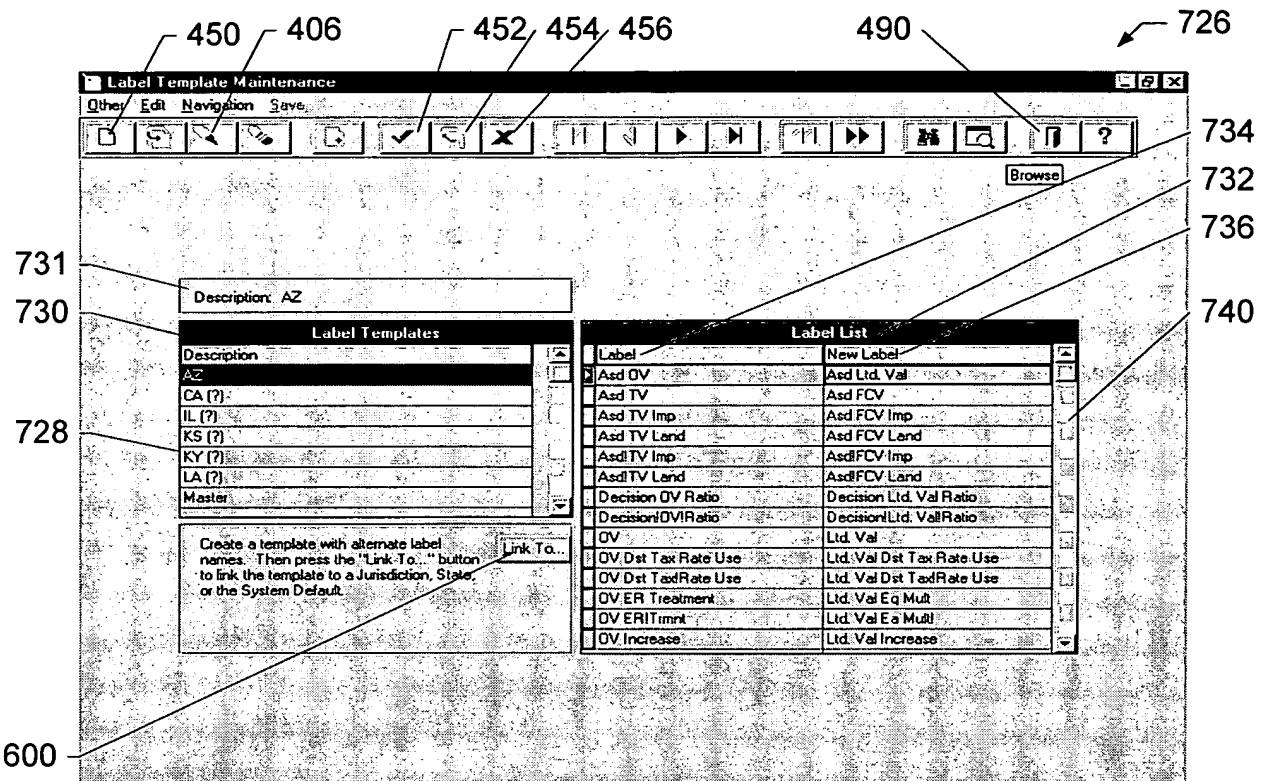


FIG. 43B Label Template

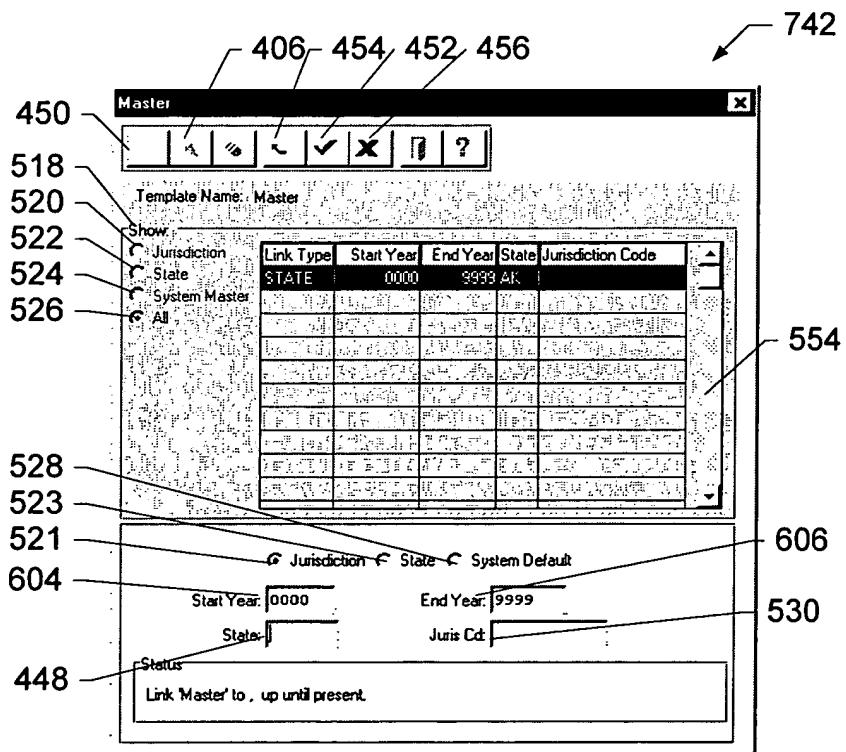


FIG. 44 Label Template Link To

Dist Code	Classification	TV Rate	OV Rate
011300	5	0.049993	0.131873
011301	5	0.049993	0.131873
011303	7	0.049993	0.131873
021300	5	0.033276	0.095237
031300	5	0.037463	0.105936
031600	8	0.037028	0.102171
031602		0.037028	0.102171
051300		0.047124	0.143199
061300		0.038875	0.097557

746	Dist Code:	Class:	<input type="button" value="H"/>	<input type="button" value="L"/>	<input type="button" value="X"/>	
756	Dist Code:	Description:				
758	Class:					
760	TV Rate:	0.000000				
	OV Rate:	0.000000				
	<input checked="" type="checkbox"/> Special District	Type:				
	Use in Update? <input type="checkbox"/> Y					

FIG. 45 - District Set Up